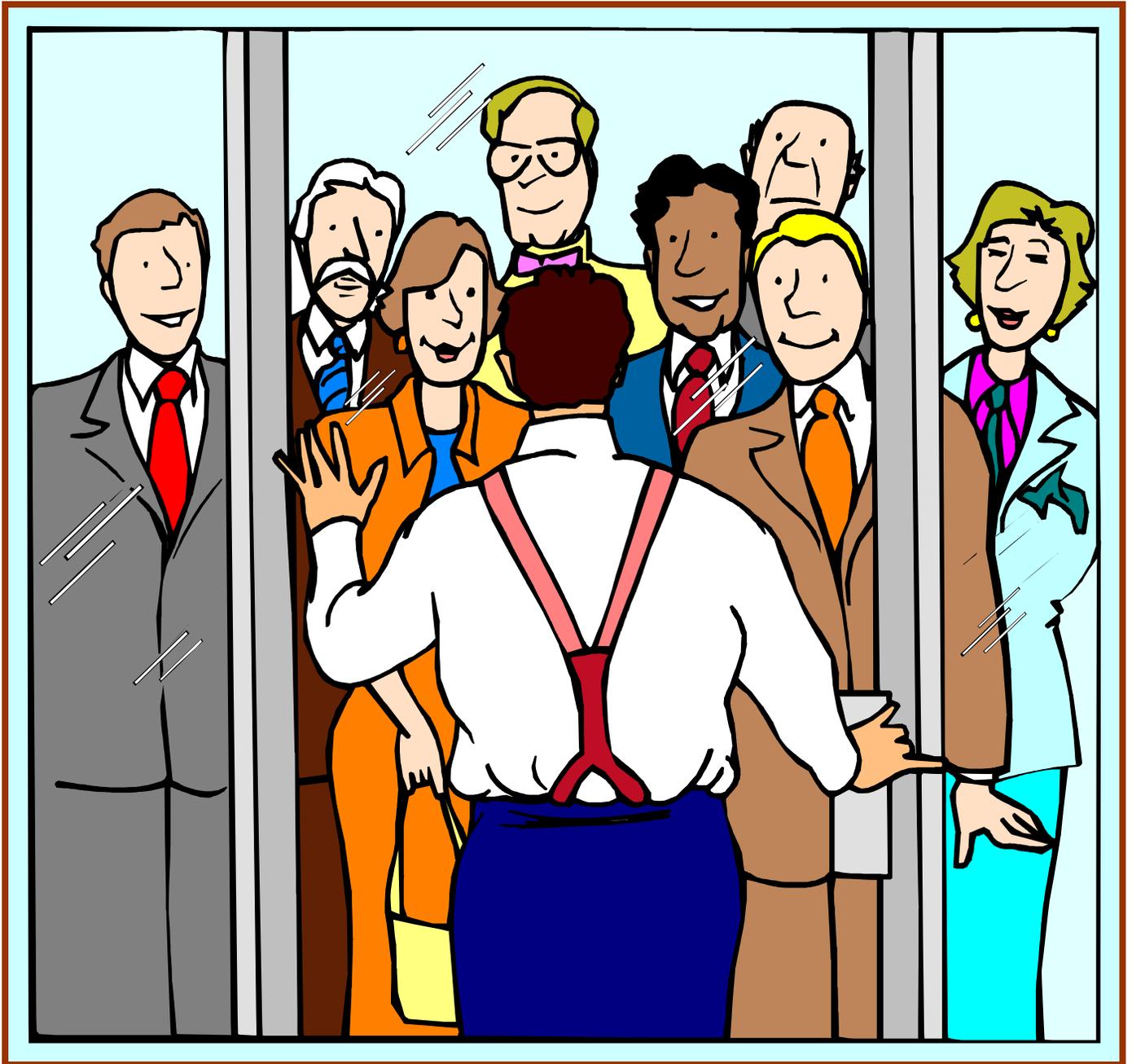


So, you're handling a



Congressional Visit

HANDBOOK: So, You're Handling a Congressional Visit
Prepared by the Congressional Activities Office, ATCS-CA, HQ TRADOC, Fort Monroe, VA 23651
Phone: 757-788-3682 or 3470

What's covered, what's not –

This handbook **covers** visits by Members of Congress and Congressional staff to HQ TRADOC.

This handbook **does not cover** visits by officials from the Congressionally-related organizations listed below. *Visits by officials from these organizations are usually very low-key and conducted with Division Chiefs and action officers.*

GAO

Government Accountability Office (GAO), the investigative arm of Congress, evaluates and audits federal agencies and programs, either on its own initiative or at the request of congressional committees, their chairmen, and ranking minority members.

The TRADOC Office of Internal Review and Audit Compliance (OIRAC) is the focal point for GAO reviews within TRADOC.

HAC- S&I

The Survey and Investigation (S&I) staff represent the House Appropriations Committee (HAC) during the course of any study or investigation. The HAC S&I teams are usually temporarily formed for specific investigations.

See Section IV, Chapter 3 of “Congressional Actions Responsibilities Standing Operating Procedures (CARSOP),” and Army Regulation 1-20.

<http://www.tradoc.army.mil/cong/army.htm>

CRS

The Congressional Research Service (CRS) is a department of the Library of Congress. Their staff provides nonpartisan, objective analyses and information on virtually any subject to committees, members, and staff of Congress.

The CRS responds to requests from Senators and Representatives and their staffs for books and research information.

DISCLAIMER

This handbook does not replace DOD Directive 4515.12, “Department of Defense Support for Travel of Members and Employees of the Congress,” Army Regulation 1-20, “Legislative Liaison,” or Department of the Army “Congressional Actions Responsibilities Standing Operating Procedures (CARSOP).” It is intended as a quick guide for visits to the headquarters by Members of Congress and their staff. The DOD directive, the AR, and the CARSOP shall take precedence over this handbook.

Defense

“It is Department of Defense policy to make available timely and accurate information so ...the Congress ...may assess and understand the facts about national security and defense strategy.”

Donald H. Rumsfeld, Secretary of Defense

Army

Contacts between commanders and officials of the Army and Members of Congress are encouraged. Army officials shall not, however, engage in any activity that could be interpreted as associating the U.S. Army with particular partisan causes or candidates. *(Army Regulation 1-20)*

Commanders and DA officials shall refrain from asking Members of Congress or Congressional staff to support funding requests not supported by the President’s budget, or to enact legislation that is inconsistent with a DA, DOD, or Administration policy or position. *(Army Regulation 1-20)*

Military installations may not be used for political assemblies or meetings

(OSD Policy) See DOD Directive 1344.10 and Army Regulation 360-5.



On December 4, 2000, the Office of the Under Secretary of Defense (Acquisition and Technology) issued a memorandum regarding Congressional Constituent Services Offices on Military Installations.

The memorandum permits installation commanders to allow use of facilities for constituent services only but prohibits use of installation facilities by any candidate (either incumbents or new office seekers), members of their staffs or their campaign representatives for: political assemblies or meetings; media events, including speeches; fund-raising social events for political candidates, parties, or causes regardless of the sponsorship; press conferences; or any other activity that could be construed as political in nature.

Source: Advisory number 01-01, 26 January 2001, DOD Office of General Counsel, Standards of Conduct Office.

Visits by Members of Congress and their staff to Army installations, facilities, training areas and events heighten congressional awareness of and support for Army programs, policies, and activities and are encouraged. Only the Offices of the Secretary of Defense or the Secretary of the Army may extend invitations for non-reimbursable travel to Members of Congress, their family members, or Congressional staff. Other Army officials shall not unilaterally issue invitations for non-reimbursable Congressional travel. *(Army Regulation 1-20)*

Congressional Visits to HQ TRADOC

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About Congressional Visits



How do they originate?

Through requests from Congress

When a Member of Congress or their staff needs to see an Army facility or meet with an Army individual, they usually notify the Army's Office, Chief of Legislative Liaison (OCLL) or the Army's Congressional Budget Liaison Office (SAFM-BUL).

OCLL maintains contact with members of the authorizing committees; SAFM-BUL, with appropriators.

Members of Congress or their staffs also make direct contact with military officials within their district or state to propose a visit while the Members are **in town**.

In this case, the Member's office is almost always responsible for travel arrangements and costs.

By invitation — locally

The Army and TRADOC encourage commanders to extend invitations to Members and their staff to attend local events where Members travel at their own expense.

By invitation — from long distance

The Army or TRADOC (on the Army's behalf) may extend an invitation to Members of Congress and their staffs to participate in meetings with leadership or to attend special events and ceremonies such as wargames, warfighting experiments, or exercises, where Members and staff can see the Army in action, sometimes with other military services.

All written invitations to travel out of Washington, D.C., should include the name and phone number of the Army point of contact — usually an Army officer within OCLL or SAFM-BUL.

Because the Army manages the funds for Congressional travel, the Secretary of the Army, through OCLL or SAFM-BUL, must approve invitations for long distance visits in advance.

Coordinate approval for the long-distance travel through the Congressional Activities Office (CAO). Once the Secretary of the Army's office has approved the travel, OCLL will prepare invitational travel orders and OCLL or SAFM-BUL will provide an Army escort to make arrangements for the travel and pay for and document expenses.

How are we notified?



Initial notification to TRADOC is usually --

- A telephone call or e-mail from OCLL or SAFM-BUL to the TRADOC Congressional Activities Office (CAO),
- A telephone call from a congressional staff member to TRADOC CAO, or
- A telephone call from a Member of Congress direct to the CG's office.

Staff notification

The Secretary of the General Staff (SGS), in coordination with CAO, will task the appropriate headquarters element to be lead office for the visit.

Notification is almost always very short-fused, with limited information available. Preparation for the visit develops over the day(s) leading to the visit.

Official notification

If the Army sponsors the visit, the Secretary of the Army's Congressional Travel Office (SALL-TVL) prepares an official message announcing the visit and its purpose.

The notification message is usually transmitted a day or two before travel begins and usually contains the following statement:

Congressional delegation (CODEL) will travel on DA orders and is authorized use of military aircraft, military ground transportation, PX, commissary, military billets, and use of military hospitals (at own expense). Military support by any DOD resource has been approved by SECARMY as non-reimbursable as authorized by paragraph V, a/1, 2, and 4, DOD Directive 4515.12 and chapter 10, DOD Directive 4515.13-R.

We don't always see the official notifications.



Tell me something about the visitors

Rank Equivalency



- Members of Congress have higher protocol precedence than general officers, to include the Chairman of the Joint Chiefs of Staff, who is the senior flag officer in the military.
- Professional staff members can be 3-star equivalent.
- Personal staff members can be 2-star equivalent.

Members of Congress

Members routinely visit leaders and organizations that are –

- Of interest to a committee on which the Member serves, or
- Within the Member's district (*Representative*) or state (*Senator*)

The visits allow a Member to observe first-hand the current status of a program; a situation that is driving a constituent concern; or a matter requiring a decision on congressional funding.

The visits also help Congress stay informed about what the Army is doing and how it is progressing.



Congressional Committee Chairmen must approve all committee-related Congressional travel. This approval process is one of the reasons we might get an initial informal notice of interest to visit, which is later confirmed or not.

Congressional Staff — personal or committee



Personal staff members work directly for a member and generally focus on local interests.

A member's Military Legislative Assistant or District Director often represents or accompanies the member during visits to military installations.

Professional staff members (referred to as PSMs) work for a committee. The committee relies on the professional staff to conduct visits and report their findings to committee members. The interest of a PSM is typically focused on programs or systems for which the committee has oversight responsibility. *PSMs on military oversight committees are often retired military officers.*

Observations made during staff visits could –

Result in a hearing or a question asked of a witness during a hearing.

Influence decisions made during markup of legislation.



What's a Congressional visit like?

Typically, you can expect that —

- The planning must start with only a few details and tentative commitments.
- The details and desired discussion topics will be sketchy at best.
- The official party will probably change as the event date draws near.
- The visit might be cancelled at the last minute due to votes, hearings, or inclement weather.
- The discussions during the visit will be cordial (*visitors are usually seeking information*).
- A general officer will host a Member of Congress. Other senior officials might host a Congressional staffer.
- The CG will either host or at least meet with a Member of Congress for a one-on-one office call.
- Visitors may possess a very broad knowledge of the Army and TRADOC, but won't necessarily be familiar with the details.
- Overnight guests are usually billeted in Armistead Hall because it allows the entire traveling party to room in the same location.
- You receive little planning assistance in the beginning but much scrutiny and visibility when the date of the visit draws near. *This could be your opportunity to shine.*



Getting Started

What are my responsibilities?

Typically the lead office's duties are —



- Planning and preparing leaders for the visit
While your office has overall responsibility for the visit itself and the information presented, CAO will provide background information on the Congressional delegation, both during reviews (IPRs) and for use as a tab to the readahead packet.
- Guiding the TRADOC staff through the process of preparing for the visit and meeting suspense dates
- Ensuring quality control of the products produced for the visit – both for the host (readahead packet) and for the visitor, which include briefing discussions, briefing charts, and take-home materials
- Recommending attendees for briefings and social events
- Arranging for and conducting in-progress reviews – *will probably include at least one with the CG*
- Preparing readahead materials for the visit and submitting the required number of copies to the Command Group – *as tasked by SGS*
- Developing the itinerary – *with assist from CAO*
- Providing the Executive Services Protocol Coordinator a fully coordinated draft itinerary for final publishing and distribution.
- Making appropriate conference room arrangements
- Maintaining a list of staff points of contact for coordination of such matters as briefing requirements; readahead input; IPR dates and attendees, take-away materials
- Submitting after-action report *Details are provided on page 18 of this handbook.*

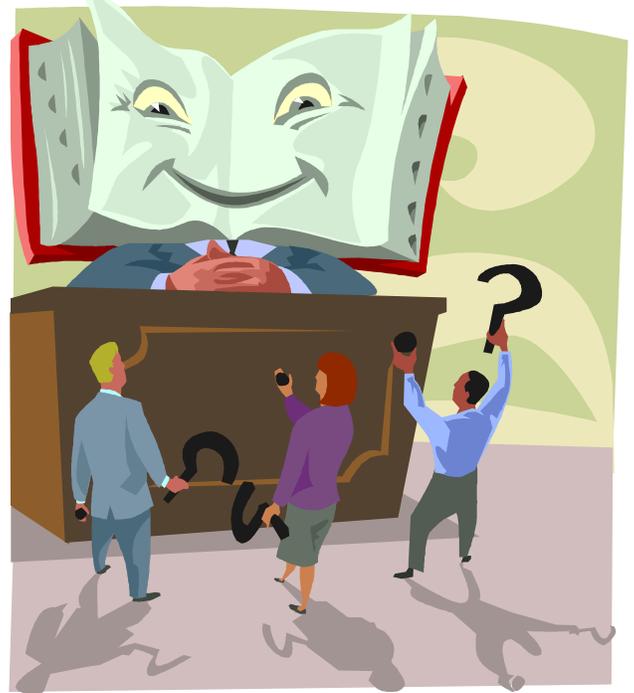
It is essential that you keep Executive Services (protocol) and CAO informed throughout the planning and execution process.

What do I need to consider?

Overarching decisions

You may need your leaders' help in providing recommendations and/or tracking down the answers to some of these questions.

- Who will meet and greet the visitors at their point of arrival?
- Who will host the visit?
- Who will host the meals?
- Who will host or lead the group discussions?
- Who in the Command Group will participate and how?
- Will a memento be presented? *By whom?*
Are discussion points needed?
- Does the agenda meet the objectives of the command?
- Do the objectives meet the visitor's request or interests?



*To start the decision process the Congressional Activities Office (CAO) will complete the first page of the **Congressional visit worksheet** (see sample at Appendix C) as soon as we are notified of the visit. We will then personally provide that page to the CG's office (Assistant XO) and give an info copy to CPG, SGS, and the lead office.*

The first page of the worksheet provides information on the visit and recommends command involvement.

You and your leaders, with CAO assistance, are responsible for following up on decisions relating to command involvement.

Individual challenges that could affect —

- Presentations?
- Meeting locations and type of transportation?
- Meals?



Mobility challenges, poor eyesight, color-blindness, hearing impairment, dietary restrictions

Discussions or briefings

- How will the discussions be conducted?

Sit-down table-top discussions led by 1-2 charts, stand up briefing with charts, or a guided tour?

- Where will the discussions take place?

Consider getting the visitors out of the conference room. If presentations will be automated, consider a dry-run.



- Are the times allotted appropriate for each discussion topic?
- Should the visit include a briefing and/or windshield tour of the post?
- What about a guided tour of the Casemate Museum?

Most congressional visitors prefer open dialogue over “death by briefing charts.”



Representative Joel Hefley (R-CO) during a House Armed Services Committee hearing on Army Transformation:

“I think one of the transformations I'd like to see the Army make in this process is to get rid of the PowerPoints. I go to a military base somewhere, anywhere in the country or the world, because I want to see what the military base is like and what it's doing, and the first thing they do is put me in a room and give me a PowerPoint [briefing]. Sometimes I spend all my time in the room doing the PowerPoint.”

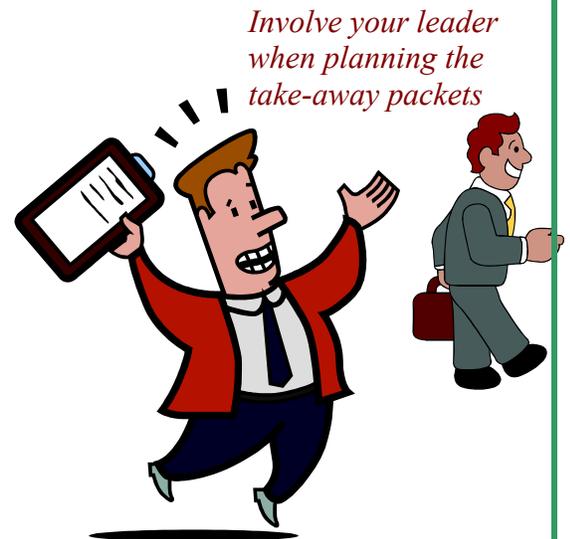
Meals, transportation, and lodging

- Will the visit involve meals? How many? Where? Host or no-host?
- What are the transportation and lodging requirements?
- Are you keeping in touch with the protocol coordinator?



Other considerations

- Will a take-away packet be provided?
- What would the take-away packet include?
Copies of briefing charts, information papers, or other publications?
- What is the dress or uniform for business events?
For social events?
On some occasions, members have asked to travel and remain in casual attire during the visit.



- Do you or the protocol coordinator need to schedule a photographer?
- If visitors are driving themselves you may need to –
 - Know the make, model, color, and license plates of their vehicle(s)
 - Know their cell phone number
 - Alert post security and the security guards at the gate
- Will you need to arrange a reserved parking space through the Protocol Coordinator?
- If visitors are remaining overnight and going straight to their billets, you may need to –
 - Escort the visitors to their billets
 - Get a key to the billets (ahead of time) to present to them upon arrival
 - Work with the Protocol Coordinator*

For more details, see the “[Congressional Visit Worksheet](http://www.monroe.army.mil/cong/guides.htm)” located on our website at <http://www.monroe.army.mil/cong/guides.htm>

Where do I begin?

1. Draft an initial itinerary

- This will not always be easy, but it's important. The itinerary is the basis for all the planning to come.

Put yourself in the shoes of the visitor and "walk" yourself through each step of the itinerary. Consider things like luggage, briefing handouts, keys to billets, meals and snacks, transportation, and personal time.



TO DO LIST

- Draft itinerary
- **Meet with bosses**
- Call protocol
- Schedule first IPR
- Decide who needs to prepare what
- Keep all informed
- Coordinate, coordinate

- Show the information that's yet to be determined. *It shows people what information they need to provide you.* And don't forget to schedule breaks.

*Give people something to at least throw rocks at.
Most people respond better to a target than a blank page.*

Initial Draft of Itinerary (sample)

*Visit of (name of Congressman)
Wednesday, July 31, 200X*

Draft

<i>0830</i>	<i>Arrive Fort Monroe</i>	
<i>0900-1130</i>	<i>TRADOC Discussions Refreshments and Greetings TRADOC Missions and Resources Break (10 minutes) Operational Environment Training for Modularity</i>	<i>(discussion host and location TBD) DCSRM (Name of briefer ???) DCSINT (Name ???) DCSOPS&T (Name ???)</i>
<i>1200</i>	<i>Lunch at (location TBD)</i>	<i>(host TBD)</i>
<i>1320</i>	<i>Office Call with CG</i>	<i>CG's Office</i>
<i>1345</i>	<i>Depart Fort Monroe</i>	

2. Get your leader on board early!!

Your leader (Deputy Chief of Staff, for instance) has the overall lead for this visit. You're doing the ground-work, but, without help, you may not be able to get the answers you need from the people who make the decisions.

You need your leader on board early – leaders talking to leaders – so you at least have a good chance at success.



- Schedule a meeting with your leader.
- Let him or her know what you're planning, where the gaps are, and where you need his or her help.
- Seek guidance on which topics to prepare the CG (or other host) for possible discussions that may come up during the visit. *You will need to alert the appropriate staff offices to prepare these.*
- Seek guidance on what information papers to provide the visitor(s). *Again, you will need to alert the appropriate staff offices to prepare these.*

OCLL will be providing the Chief of Staff of the Army (CSA) a written (and sometimes verbal) review of the visit once it's complete. Also, when the TRADOC CG meets with a Member, he usually calls or sends a note direct to the CSA.

- *You can bet that TRADOC leaders want this visit to be a success. But they may not have time to focus on it until a few days before the visit. Too late for your needs.*
 - *You won't likely get a formal audience with TRADOC leadership until the final in-progress review (IPR) – which is often only days before the visit. Again, too late.*
 - *Without up-front guidance, you and your office may be planning the wrong topics of discussion, the wrong location for those discussions, or the wrong format, location, or host. Not good; lot of time wasted.*
- Also, during the initial in-progress reviews, you may need the forceful voice of one of your leaders to ensure that discussion leaders –
 - Aim for a two-way dialogue versus a one-way chart recital.
 - Use only a few charts that emphasize main points.
 - Keep the charts simple.

If the Member of Congress represents a TRADOC activity, highlight information about that activity wherever possible during the briefing.

3. Call Executive Services (Protocol Coordinator)

You and the protocol coordinator handling the visit will have to keep each other informed on all new developments as they happen.

The Congressional Activities Office will notify you and the protocol coordinator when OCLL, SAFM-BUL, or the Member's offices relay information to us.

4. Send a preliminary e-mail

- Your first e-mail could at least —
 - Notify everyone of the visit
 - Ask for a single point of contact
 - Schedule the first in-progress review
 - Provide a copy of the draft itinerary
- If you have details, include them – particularly any command guidance that applies.



5. Become familiar with planning tools available to you

APPENDIXES to this handbook, which are –

Sample milestone chart for Congressional visits at HQ TRADOC - [Appendix A](#)

Suggestions for conducting initial in-progress reviews - [Appendix B](#)

Worksheet for Congressional visits - [Appendix C](#)

Page one of the worksheet is where CAO recommends command involvement. It also serves as a tool for the CG's office to confirm or change those recommendations. The remaining 7 pages are for you to use, if desired.

WORKSHEET: The Congressional Visit Worksheet located on our website at

<http://www.monroe.army.mil/cong/guides.htm>

HANDBOOK: *So, You're Meeting with a Member of Congress*

<http://www.tradoc.army.mil/cong/guides.htm>



Then what?

Determine which other reviews you'll need

For most Member visits you will need to hold at least three in-progress reviews (IPRs) --

- One or more in-progress reviews (IPRs) for action officers

See Appendix B: Suggestions for conducting initial IPRs.

- One or two for staff principals
(Deputy Chiefs of Staff or other briefing officials)

- One or two for DCG and/or CG

Usually if there is an IPR for the CG, the DCG/Chief of Staff will want to review the progress prior to presenting it to the CG.

If you and your office chiefs do sufficient groundwork and preparations for the visit, the number of IPRs will be fewer and they will run smoothly. If the leaders feel more work is needed, more IPRs will be required.



Schedule the reviews

- Contact the scheduler for each principal (CG, DCG, or DCS) to arrange time on the calendar for each in-progress review.
- Arrange for use of meeting locations (if necessary).
- Notify everyone who needs to attend.

Determine who needs to provide information on what

- What issues need to be addressed (information or discussion papers from whom?)

Discuss these with your leader(s) and during the IPRs.

- If the CG or other host has an office call with the visitor(s), who is preparing the discussion points? Will the discussion points be included in the readahead or provided separately?

Discuss this requirement with CAO and CPG.

- Do the visitors have a TRADOC activity within their district?

Ask each staff office to contact their functional counterparts at that installation to get information for preparing discussion papers for the readahead packet.

You could provide a resource overview; a personnel overview; good news; bad news; updates on matters the visitor has expressed an interest (current and past).



The lead office is responsible for quality control of the information presented. Therefore, when you receive a paper, make sure the submitting office has officially approved the input and has coordinated it with all other appropriate offices or activities.

Keep staff informed on due dates for —

- Submitting copies of charts to you for host's readahead packet
- Submitting discussion papers for the host's readahead packet
- Loading briefing charts electronically – if necessary
- Submitting informational topic papers or copies of any publications to be included in the visitor's take-home packet

Involve your leaders when planning the readahead packet for the TRADOC host as well as the take-away packet for the visitor.

Send a detailed email, which might include —

- Date, time, and location of next IPR – and who should attend
- Date and time you need readahead input, such as –
 - Briefing charts with a one-page summary sheet of the briefing
 - Discussion papers to prepare the host for topics that may arise during the visit
 - How many copies you need of the briefing charts
How many color copies; how many black and white?
- Date you need information papers or publications for inclusion in the take home packet for the visitors.

Difference in use of Discussion Papers and Information Papers

*Discussion papers for the readahead prepare TRADOC leaders with information that will be discussed during the visit. These discussion papers allow you to provide **facts** and **key points to be stressed** during the discussions. (See [TRADOC Memo 1-11](#))*

Information papers for the take-home packet provide the visitor with information the TRADOC staff feels would be of interest to the Member's office. For instance, if the visiting Member has Fort Lee in his district, the TRADOC staff might provide information papers on topics relating to the Combined Arms Support Command at Fort Lee, as a means to update the Member and his office.

Responsible staff offices should coordinate these topics with TRADOC activities. Your leader may want to call the Chief of Staff at the TRADOC activity for insights.



Getting help

What can I expect from others?



Congressional visits require a great deal of coordination. Listed below are offices typically involved in planning for congressional visits, along with actions for which they may be responsible.

This is not a tasking document and might not include everything.
Keep in mind that each visit is unique, and staff responsibility can vary.

OCLL

- Notifies the Congressional Activities Office (CAO) of the proposed visit and provides other information as they get it, such as: purpose of the visit, names of travelers, travel plans, and specific topics of discussion.
- Advises on meal requirements (*dietary restrictions, etc.*).
- Coordinates the itinerary with the travelers.
- Provides Army escort for visitors traveling from Washington, D.C.
- Issues invitational travel orders; secures funding for the travel.
- Takes Army-related notes during the visit.
- Monitors due-outs for the Army.

If the visitor is an appropriator, the Army's Budget Congressional Liaison Office (SAFM-BUL), performs the above missions -- except for issuing travel orders which only OCLL can do.

Congressional Activities Office (CAO)

- Coordinates visit details with OCLL and/or SAFM-BUL.
- Advises the staff lead on suggested topics of discussion and visitor's interests.
- Recommends suggested level of participation to OCG and/or ODCG/Chief of Staff.
- Provides readahead input to staff lead (*usually includes biography, background research, and statements made by Member during hearings or speeches*).
- Attends in-progress reviews (IPRs).
- Escorts or assists with escorting visitors (*an escort is sometimes from the HQ staff*).
- Forwards to OCLL and/or SAFM-BUL any due outs resulting from the visit.

Secretary of the General Staff (SGS)

Staff Actions Division of SGS

- Officially appoints the lead office for the visit – sometimes conferring with CAO for recommendations.
- Tasks the lead office to prepare a readahead for the host or hosts of the visit.
- Tasks and monitors completion of due outs for the command.

Executive Services Division of SGS

- Seeks funding approval for snacks, meals, mementos, etc. (*0012 funds*).
- Suggests and procures appropriate mementos *after obtaining command group approval*.
- Prepares and distributes official itinerary and seating chart(s).
- Provides protocol escorts, vehicles, and drivers for ground transportation, as required.
- Arranges lodging, meals and refreshments, photographers, and sometimes conference room setup.
- Determines availability of staff principals for participation in the visit, based on lead office's recommendations.
- Determines availability of staff principals for social events (*reception, dinner, etc.*), based on lead office's recommendations.
- Attends in-progress reviews (IPRs).



Public Affairs Office (PAO)

- Arranges for media opportunities, if appropriate.
- Ensures congressional travelers (*with assist from CAO*) comply with Army public affairs policies, as they pertain to partisan political activities on a military installation, and DOD guidance concerning election year activities.

Post Headquarters

- Provides guided windshield tour of the post and/or a tour of the Casemate Museum (*when scheduled for visitors*).
- Hosts visitors for discussions on the installation (*if requested*).
- Oversees lodging or use of other MWR facilities by visitors.
- Provides appropriate security and other logistical support, as necessary.

The Command Group

- Advises on commander's intent (*for example: overall guidance, approval of the itinerary, the discussion topics, and the participants*).
- Advises on CG and/or DCG participation (*full participation; office call only; host a lunch or dinner; or host or attend a social event*).
- Schedules appropriate events (IPRs, office call, meals, socials) on the CG's and/or DCG's calendar (*in coordination with CAO and lead office*).

The Commander's Planning Group (CPG) serves as liaison between the lead office and the CG concerning the commander's intent, participation, and desires concerning the visit.

Briefing officers and participants

- Support the lead office by preparing and presenting subject matter discussion material for both the readahead packet and the visitor's take-away packet (*when provided*).
- Provide a brief summary of what you plan to discuss. Attach the summary to a copy of the briefing charts for inclusion in the readahead.
- Attend in-progress reviews, as requested.
- Attend social events associated with the visit, when invited.



After the visit

Due outs

Sometimes visitors request additional information. Whenever possible, this information should be provided during the visit by the general officer in charge. *It's so much easier that way.* A copy of any information provided to congressional visitors should also be given to the Army escort and the TRADOC Congressional Activities Office (CAO).



Visitors may ask for information during the visit that is not readily available (*for example a report that has not been cleared for release*). It is important that this additional information be forwarded to the member or staffer as soon as possible following the visit. Once the information has been coordinated and cleared for release by the proponent office, responses to due outs may be provided to CAO for forwarding to OCLL.

Reporting the contact

AR 1-20 (Legislative Liaison) requires that congressional contacts be reported.

Your office, as the lead office, is responsible for that report. As a minimum, the report shall include:



- Date, place, and duration of visit
- Names of member(s) and staff representative(s)
- Area(s) of interest
- Summary of information furnished or discussed
- Any corrective action taken or recommended
- Any due out(s) resulting from the visit

You should also report all contacts to the Congressional Activities Office.

The CAO keeps a list of all Congressional contacts within the command and periodically furnishes this information to the Commanding General's office.

A web form is available at: <http://www.tradoc.army.mil/cong/ReportingContacts.asp>. Use of the web form automatically reports the visit to the TRADOC Deputy Commanding General / Chief of Staff (DCG/Chief of Staff); HQDA (OCLL/SAFM-BUL); and TRADOC's Congressional Activities Office.

Appendix A

Sample Milestones – Congressional Visits to HQ TRADOC

When	Who	What
E - 14	OCLL or SAFM-BUL	Notify the command of proposed visit
E - 14	CAO	<ul style="list-style-type: none"> • Seek details: <i>names, dates, purpose, and requested topics of discussion, mode of travel, meal requirements.</i> • Make recommendations for Command involvement. • Refer action to SGS for official tasking.
E - 13	SGS	<ul style="list-style-type: none"> • Task for action. • Assign lead agency; copy to other staff offices.
E - 12	Lead Office	<ul style="list-style-type: none"> • Draft an itinerary and/or refine the itinerary. • Provide initial guidance and requirements to staff. • Request name of staff points of contact (POCs).
E - 10	Lead Office	Host initial in-progress review with action officers. <i>(As a minimum, hold meeting with Executive Services, CPG (if CG involvement likely), and CAO reps.)</i>
E - 6	All <i>(including some who may not be involved in the visit)</i>	Provide read ahead input to lead office. <i>Even if your office is not participating in the visit, you may need to provide leaders with discussion papers on relevant matters that may be of interest to the Congressional visitor(s).</i>
E - 5	Principal in charge of lead office (DCS, DCG)	Host in-progress review with briefing officers.
E - 4	Lead Office	Submit readahead package to Command Group
E - 2	Principal in charge of lead office (DCS, DCG)	Provide in-progress review (IPR) to DCG and/or CG.
Event	Lead Office; CAO; Executive Services; visit participants	Congressional Visit
E + 1	Visit Lead	Submit after-action report – web form available at http://www.tradoc.army.mil/cong/reportingContacts.asp
E + 3	Responsible staff offices	Complete due-outs (if any)
E + 7 (or sooner)	CAO	Submit due-outs to OCLL or SAFM-BUL (Army escort).

These milestones --

Are based on an ideal situation of two weeks notice of visit

Highlight only the significant planning steps

Require tailoring according to level of visitor and Command Group involvement

Appendix B

Suggestions for conducting **initial** in-progress reviews (IPRs)

First IPR for action officers

Give a synopsis of the visit and relay any command guidance received.

Review each item on the itinerary.

Is the allotted time correct?

Is the title correct? Will the visitors be able to understand it?

For instance, don't use "DCSRM Overview" as a title of a topic of discussion. Instead, call it a "Resource Overview."

Have discussion leaders (briefers) been identified?

Are all discussion locations and meal rooms reserved?

Is ground transportation arranged and correct?

Review what discussion papers might be needed for the host.

Discuss what information papers would be nice for the visitor to have in the take-home packet.

Second IPR for action officers

Relay any changes or command guidance received

Everyone, in turn, relays the progress they've made in their respective areas.

Each office brings a copy of their charts.

You will need the charts when preparing the readahead (how many?)

It's always a good idea to have someone review all the charts to make sure there are no duplications or numbers that don't match.

Appendix C

Congressional Visit Worksheet **SAMPLE ONLY**

WHO and WHY		
Visitor(s)	Rank Equivalency	
Representative Ike Skelton (D-MO) Mr. xxxxxxxx, Military Legislative Assistant to	<p><i>The Congressional Activities Office (CAO) will fill out the first page of this worksheet and personally provide it to the CG's AXO and give an info copy to CPG. This page (when filled out) serves as a tool for the CG's office to confirm or change the recommended command involvement. The remaining pages are for your use if you choose. You, with assistance from your leader and CAO, will be responsible for tracking the decisions.</i></p>	
Purpose of Visit and Special Considerations		
Get TRADOC views xxxxxxxx		
Known Interests		
Anything related to Soldier wellbeing Professional military education (has published a recommended reading list for military officers) Teaching of Military History in military schools; Prosperity of Fort Leonard Wood		
Possible Issues		
May want to discuss the merits of combining individual service schools (Army War College, Navy War College, etc.) <i>(fictional – we made this up)</i>		
Army Escort		
COL xxx xxxxxxxx, Chief of Programs Div, OCLL – DSN: xxx-xxxx		
WHEN – DURATION OF VISIT		
Arriving	Date & Time 14 Nov 06, 1530	Where Walker Army Air Field (Fort Monroe)
Departing	Date & Time 15 Nov 06, 1400	Where Walker Army Air Field (Fort Monroe)
Recommended COMMAND INVOLVEMENT		
Command Involvement	What -- Recommend that a TRADOC leader –	Who
	• Meets Mr. Skelton at Walker AAF and escorts him and his party to Armistead Hall	DCG-IET
	• Hosts an evening dinner or social at their quarters	CG
	• Leads the following group discussions in CCR Operational Environment Update on Professional Military Education Modularity Training for modularity	CG (overall lead) DCSINT DCST (CAC?) DCG-Future DCSOPS&T
	• Presents a memento to Mr. Skelton	CG
Full Day		
Partial Day		
Social		
Office Call		
Comments and Feedback	<p><i>This entire 8-page checklist is available at our website in both PDF and word processing versions.</i> http://www.monroe.army.mil/cong/guides.htm</p>	

BRIEFING DETAILS

Level of Briefers	GO or SES	Directorate	Action Officer
Presentation Medium	Deskside	Overhead	Electronic Other
Briefings	Topic or Title Time	Name of Briefer	Phone Allotted
Location	Morning	Afternoon	Confirmed with: Date:
Host	Morning	Afternoon	Informed or Agreed (Yes/No) Confirmed with: Date:
Chart Loading	Morning	Afternoon	Informed all briefers (Yes/No) Date:
Briefers Arrival Time	Morning	Afternoon	Informed all briefers (Yes/No) Date:
Other Attendees			Office & Phone Number

IN PROGRESS REVIEWS (IPRs)				
<i>IPR(s) with Action Officers</i>	Date and Time	Location	Alerted Participants	Confirmed Attendance
<i>Other IPR(s)</i>	Date and Time	Location	Alerted Participants	Confirmed Attendance
<i>IPR With Host</i>	Date and Time	Location	Alerted Participants	Confirmed Attendance

IPR ATTENDEES			
Name	Office	Briefer	Phone

IPR ATTENDEES			
Name	Office	Briefer	Phone

Information to Discuss with Protocol Coordinator

TRANSPORTATION				
<i>Times & Locations</i>	<i>Arrival</i>	Departing for Pickup Trip		Departure Point
	<i>Departure</i>	Departing for Return Trip		Departure Point
BILLETING				
Location		Number in Party		Confirmation Information --
Location		Number in Party		Confirmation Information --
Other Billeting Information				
MEALS AND SNACKS				
MEALS	<i>Yes</i>	<i>No</i>		
<i>Host</i>	Meal 1	Meal 2	Meal 3	Meal 4
<i>Location</i>	Meal 1	Meal 2	Meal 3	Meal 4
<i>Participants</i>	Meal 1	Meal 2	Meal 3	Meal 4
<i>Restricted Diet</i>	<i>Yes</i> <i>No</i>	Specifics		
<i>Preferences</i>	Food		Beverage	
<i>Seating Instructions</i>	For Meals		For Briefings	
SNACKS <i>Yes No</i>	When		Where	
<i>Protocol Welcome Packet</i> <i>Yes No</i>	Contents?		<input type="checkbox"/> Give upon arrival (in van) <input type="checkbox"/> Give upon departure (in van) <input type="checkbox"/> Placed at briefing seat <input type="checkbox"/> Placed in billeting area <input type="checkbox"/> Other	

MEMENTOS				
<i>For Main Visitor</i>	<i>Yes</i>	1st Choice	2nd Choice	3rd Choice
	<i>No</i>			
	Presented By		Time and Location	
<i>For Accompanying Party</i>	<i>Yes</i>	1st Choice	2nd Choice	3rd Choice
	<i>No</i>			
	Presented By		Time and Location	
MEDIA – Discuss with Public Affairs Officer-				
<i>Photographer</i>	<i>Yes</i>	Time	Location	
	<i>No</i>			
<i>Media Opportunity</i>	<i>Yes</i>	Time	Location	
	<i>No</i>		Public Affairs Escort	

